Visit Gateway at https://gateway.ifionline.org/login.aspx

Gateway User Guide

Submitting Completed Budget Forms

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Introduction

This user guide will assist with submitting forms after they have been completed. Once a form has been submitted, it can no longer be edited. This is the final step for most units in the Gateway Budget application. Submitting the forms is an essential step as it allows the Department to review and potentially certify a unit's budget.

Deadlines

Not all forms are due on the same date. The Form 3: Notice to Taxpayers should be submitted once it has been sent to be published. This allows the Department to post units' Notice to Taxpayers online at www.budgetnotices.in.gov. The County Council Review Worksheet must be submitted by **September 2, 2014**. The Debt Worksheet only needs to be submitted if the unit is repaying a debt through a debt service fund. With the exception of the Form 3 and County Council Review Worksheet, all other forms are to be submitted within 48 hours of adopting the budget.

Outside of Gateway, Indiana Code 6-1.1-17-3 requires that the first publication of the Notice to Taxpayers must be **no later than September 13**, and the second publication must be **before September 21**. Please contact your Field Representative regarding additional advertising and other deadlines.

Signing the Form Electronically

At the bottom of all the forms except Form 3 and Form 4, there is a box for placing an electronic signature on the form. Only the user with submission rights will see the signature box.

To sign the form, first type your name and title into the signature box. After that, you will need to enter a four-digit PIN. This PIN has been sent to the person with submission rights via email. You may contact the Department at gateway@dlgf.in.gov or at (317) 232-3777 in the event that you have lost or not received a PIN code. Once you select "Sign and Date Form," today's date will automatically populate the date field.
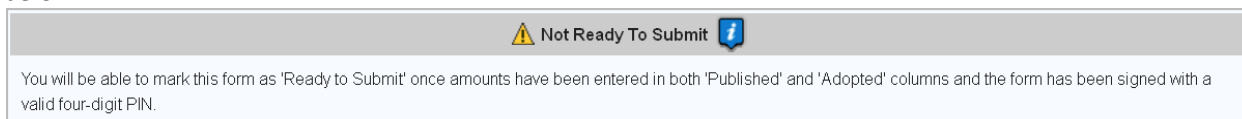

Once the red text appears stating "Form signature values saved," the form is successfully signed. Each form will need to be signed individually prior to submitting.

Validation/Required Fields

Most forms in Gateway have some type of validation that must be satisfied before the form can be marked as "Ready to Submit" and then be submitted. Due to the variety of units that submit budgets, validation can only check for very basic criteria. As a result, although the "Ready to Submit" option appears, it does not mean that the form is necessarily complete.

At the bottom of each form is the "Ready to Submit" status box. An example from Form 1 is shown below.

Each form's Ready to Submit status box contains a list of all the validation that must be met in order to be able to submit the form. The Form 1 example above reads,
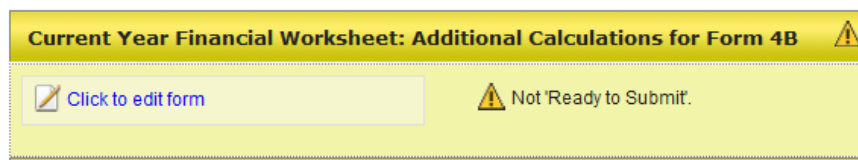
> *"You will be able to mark this form as 'Ready to Submit' once amounts have been entered in both 'Published' and 'Adopted' columns and the form has been signed with a valid four-digit PIN."*

In Form 1, Gateway will check to make sure that the form has been signed and at least one amount has been entered in both the published and adopted columns. It is possible to submit Form 1 with only a single line item as long as both amounts are entered. This is why is very important to review the forms individually for accuracy and completeness prior to submitting them.

Each form has its own validation which can be reviewed by reading the "Not Ready to Submit" box at the bottom of the form. As long as the forms are complete, no issues should be encountered marking the form as "Ready to Submit."

Error Prevention Report

The Error Prevention Report is designed to help users prevent basic commonly made mistakes. It is *highly recommended* that this report be run before publishing, adopting, and submitting budget forms. Any error that appears should be reviewed to better ensure accuracy. The link to this report can be found on top of the Budget Form Menu.
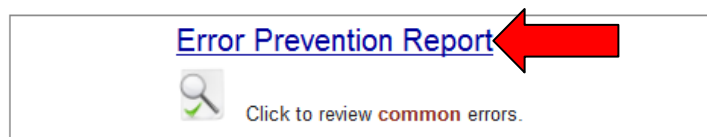
The potential errors in this report are divided into two categories: errors to review prior to publishing and errors to review after submitting Form 3. The determining factor on which errors appear is the submission status of Form 3. The Error Prevention Report will automatically generate upon opening the report. Please be sure to review these errors before publishing Form 3: Notice to Taxpayers and later review the new list of errors after publishing.

Upon opening the report, a list of potential errors will populate the page below. It is very important to note that **this report will not find all possible mistakes, but is designed to catch the most common ones.**

This will list the errors as categorized by the form and number of errors, the error, a description of the error, and a link to display the funds that are affected by this error.

To view the list of affected funds, click the blue "# fund(s) affected" button.

Once the funds affected button has been selected, a list of the funds containing the error will appear.
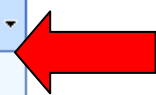
Some officials may find it useful to print out the errors. This page can be printed through the print option on the top, left-hand side of the page.

Once the page appears in a new window, click on the icon that resembles a save icon in the middle at the top of the page to view the export options.

From the list of export options, the Error Prevention Report may be exported into a PDF, Word, Excel, or many other different file types. This allows users to personalize how they wish to have data displayed.

As errors are corrected they will be removed from the list the next time the report is accessed. Please remember that once Form 3 is submitted, Gateway will begin checking for additional errors once the report is accessed again.
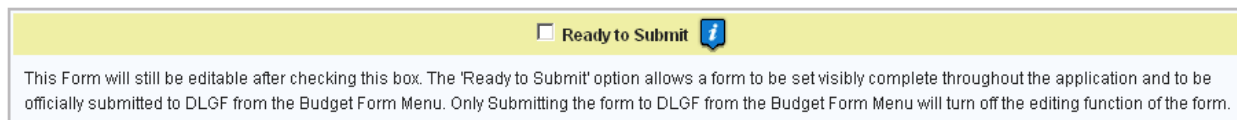
Marking the Form "Ready to Submit"

As previously mentioned, at the bottom of each form are the "Ready to Submit" status boxes. Before completing the form a grey box will display that is titled "Not Ready to Submit."

As in the past, the 2015 budget forms have a feature built in called validation. This does not allow the form to be marked as "Ready to Submit" or be submitted until the required fields are complete. Validation will help prevent some commonly found errors. Upon closer review, you will notice that each grey "Not Ready to Submit" box states the validation for each form.
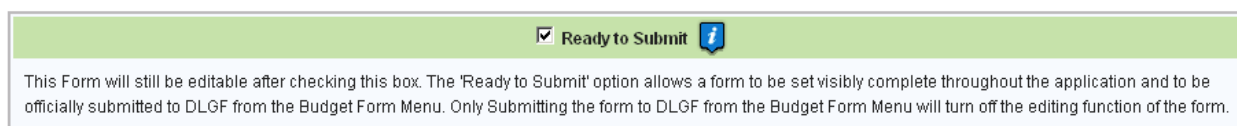
Once all the listed validation has been completed, users will then have the ability to mark the form as ready to submit by clicking on the check box. Users with either submission or editing rights will be able to mark the form as "Ready to Submit." Do not check this box until it is confirmed that the form is complete and correct. Validation can only check for certain basic things, only you can confirm that the form truly is ready to submit.
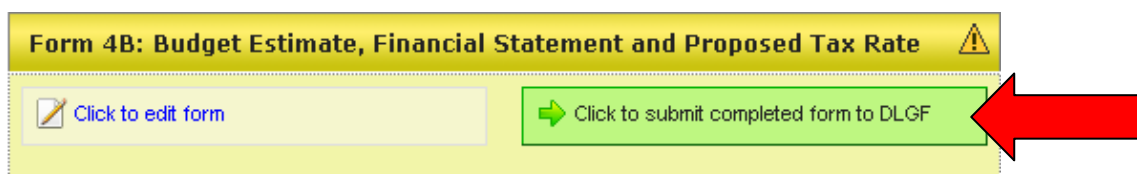

Once this box is checked, the box will turn green and the form will now be marked as Ready to Submit. The form can still be edited until it is submitted.
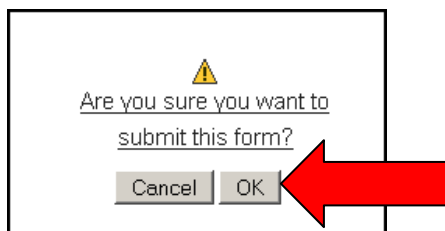

Submitting a Form

Note that after a form has been marked as "Ready to Submit", the form under the Budget Form Menu now shows a green submit option.
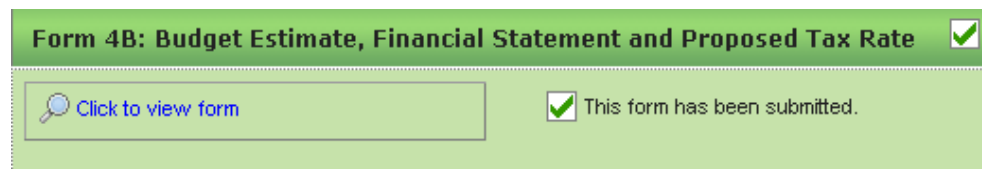

If the form is complete and no further changes will be needed, click on the green "Submit" button. A pop-up box will appear asking if you are sure you want to submit this form. If you are sure simply press "OK".

As depicted below, the form on the Budget Form Menu will now appear green and the only option available is to view the form.

You will continue submitting your remaining forms, with the exception of Debt Worksheet if it is not applicable.

Please also ensure the County Council Review Worksheet is submitted from the Unit Main Menu by **September 2, 2014**. The Sign and Submit button will save the signature and submit the worksheet in a single click.

You may no longer edit a form once it is submitted. If you have submitted a form by mistake please contact the Department at gateway@dlgf.in.gov or at (317) 232-3777.

Congratulations! You have successfully submitted your budget forms. You will also need to scan and upload certain documents such as your Proof of Publication and your Signed Form 4. Please see our other user guides for assistance with other portions of the budget. If you have any questions, please contact the Department at gateway@dlgf.in.gov or at (317) 232-3777.